Rural Decision Makers SURVEY

Bioeconomy Science Institute Maiangi Taiao

Technological adoption and on-farm mitigation: New findings from the Survey of Rural Decision Makers

Pike Stahlmann-Brown

27 January 2026

New Zealand Institute for Bioeconomy Science Limited

Rural Decision Makers SURVEY

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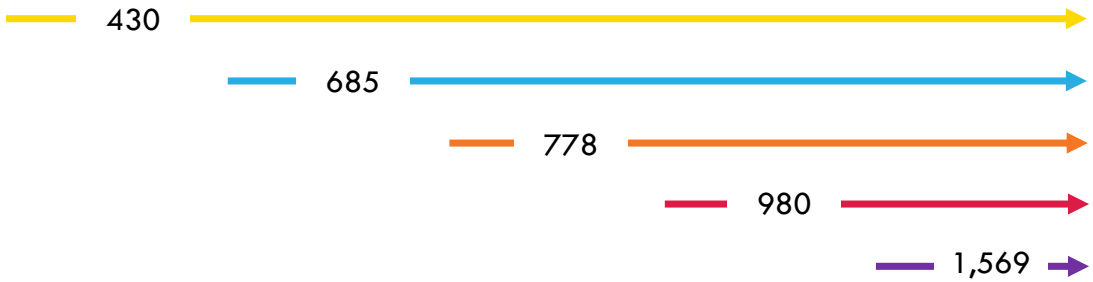
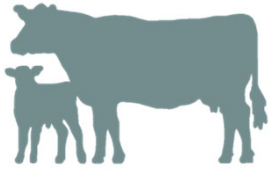
2013 1	2015 2	2017 3	2019 4	2021 5	2023 6	2025 7
~1,500 responses	~2,800 responses	~4,500 responses	~3,750 responses	~6,700 responses	~5,200 responses	~2,800 responses
237 questions 25 minutes	288 questions 27 minutes	237 questions 21 minutes	336 questions 31 minutes	131 questions 29 minutes	134 questions 29 minutes	96 questions 20 minutes

700+ variables



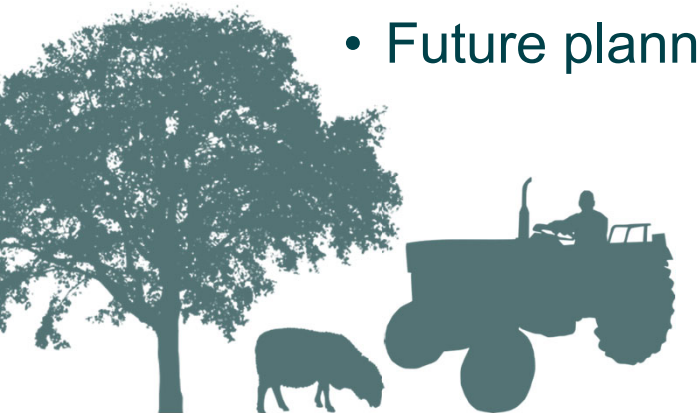


Core topics

- Location, physical features
- Land use, land-use change
- Management priorities
- Profitability
- Values
- Well-being
- Demographics
- Future planning

Focus topics

- Catchment groups
- Irrigation
- Climate and weather
- Technological adoption
- Gene technologies
- Regulatory environment
- Farm advisors



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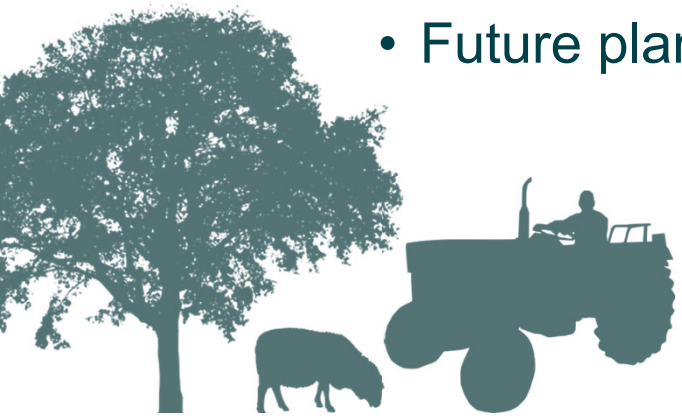
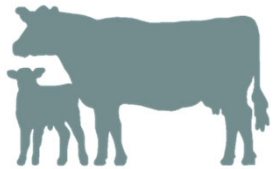


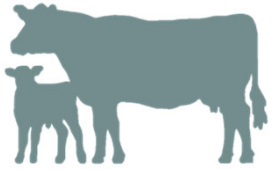


Survey 2025

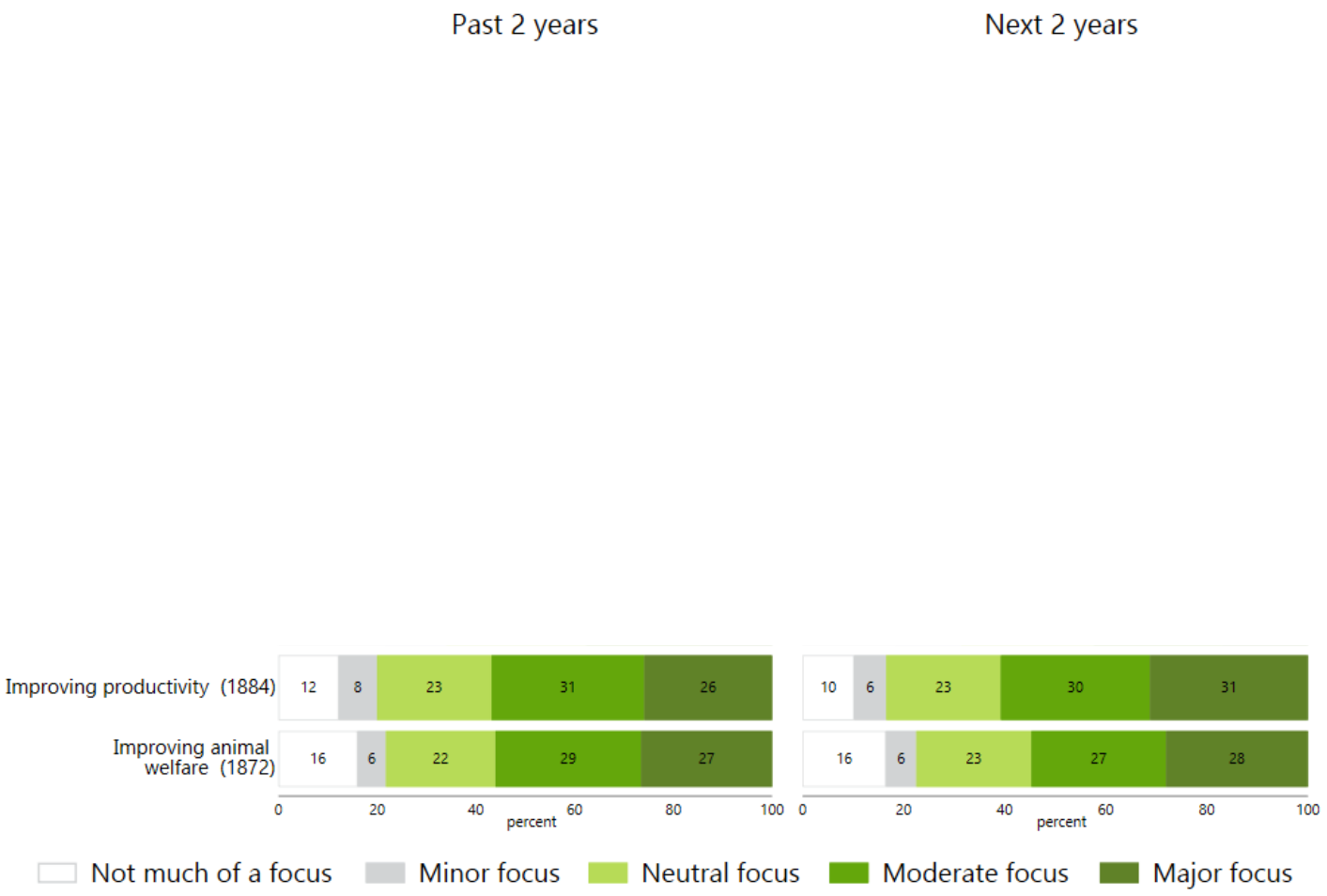
Rural Decision Makers SURVEY

Bioeconomy Science Institute Maiangi Taiao

- Conducted onlineOur database + Promoted by Beef+Lamb NZ, DairyNZ, FFA, HortNZ, & NAIT
- Unique URL
- Charitable donations, prize draws
- 1,913 Commercial respondents (4.4%)
- 881 lifestyle respondents (1.3%)
- 13 cities + 51 of 53 districts
- 64-year old male of European/Pākeha ancestry with a diploma in agriculture
- Survey weights based on region & industry

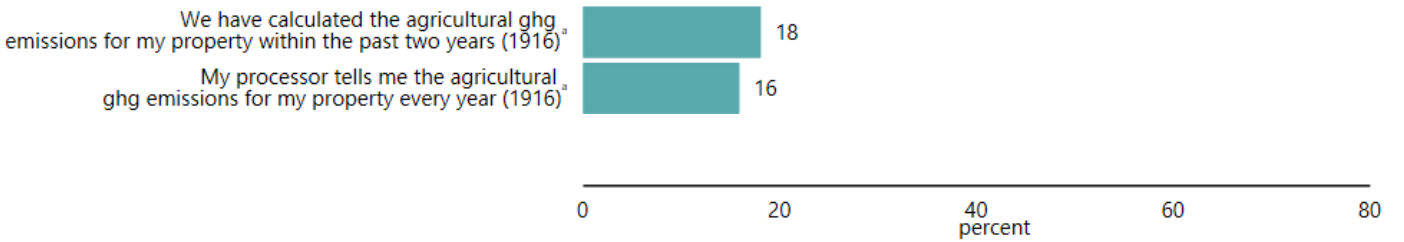


Management priorities



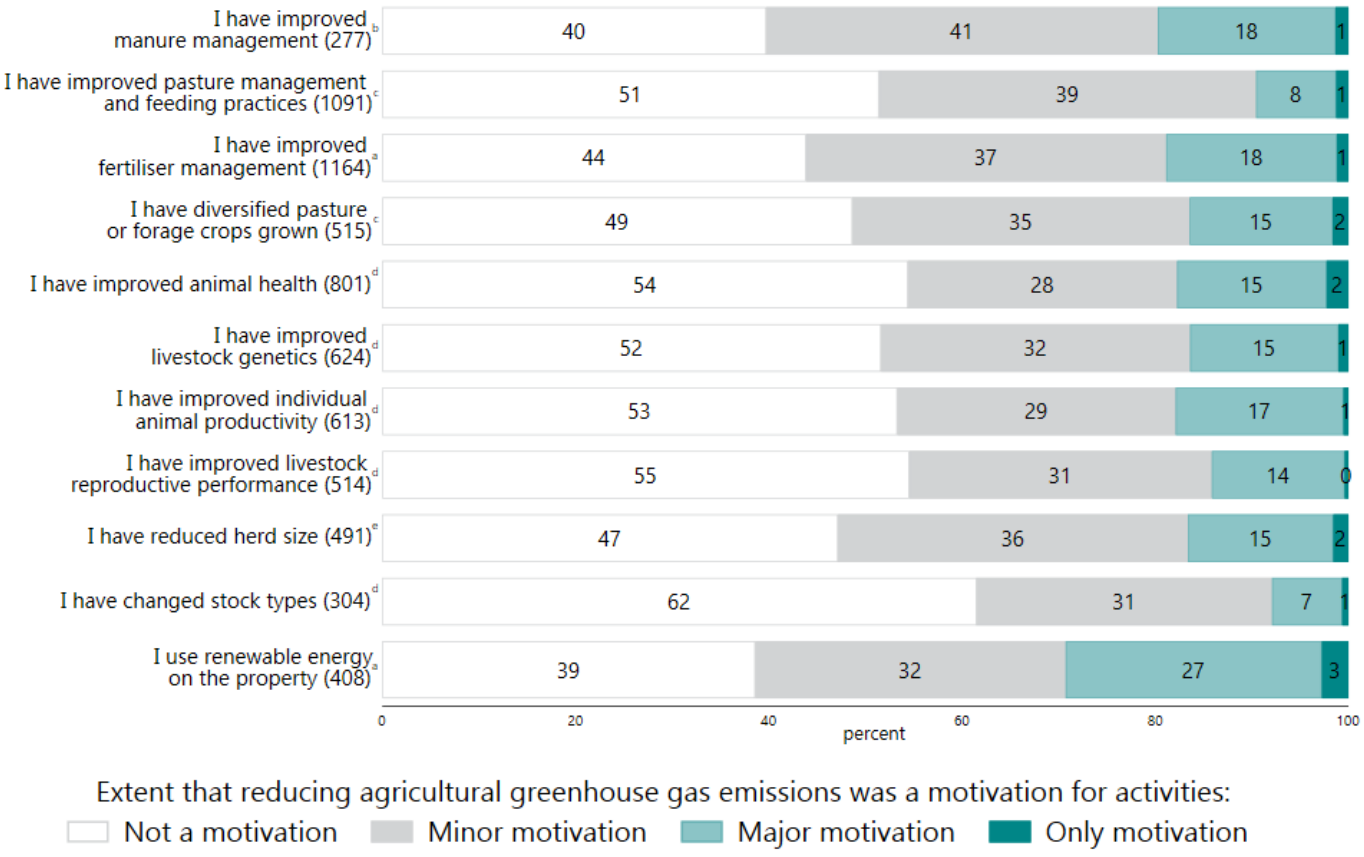
Number of respondents in parentheses.
Proportions have been weighted by primary activity and region.

Current adoption of GHG technologies



Number of respondents in parentheses.
Proportions have been weighted by primary activity and region.
a: All commercial operations
b: Operations with dairying activities.
c: Operations with sheep, beef, prime beef cattle, dairying, grazing, deer farming, pig farming, or other livestock farming activities.
d: Operations with sheep and beef, prime beef cattle, dairying, deer farming, pig farming, or other livestock farming activities.
e: Operations with sheep and beef, prime beef cattle, dairying, deer farming, or pig farming activities.

Current adoption of GHG technologies



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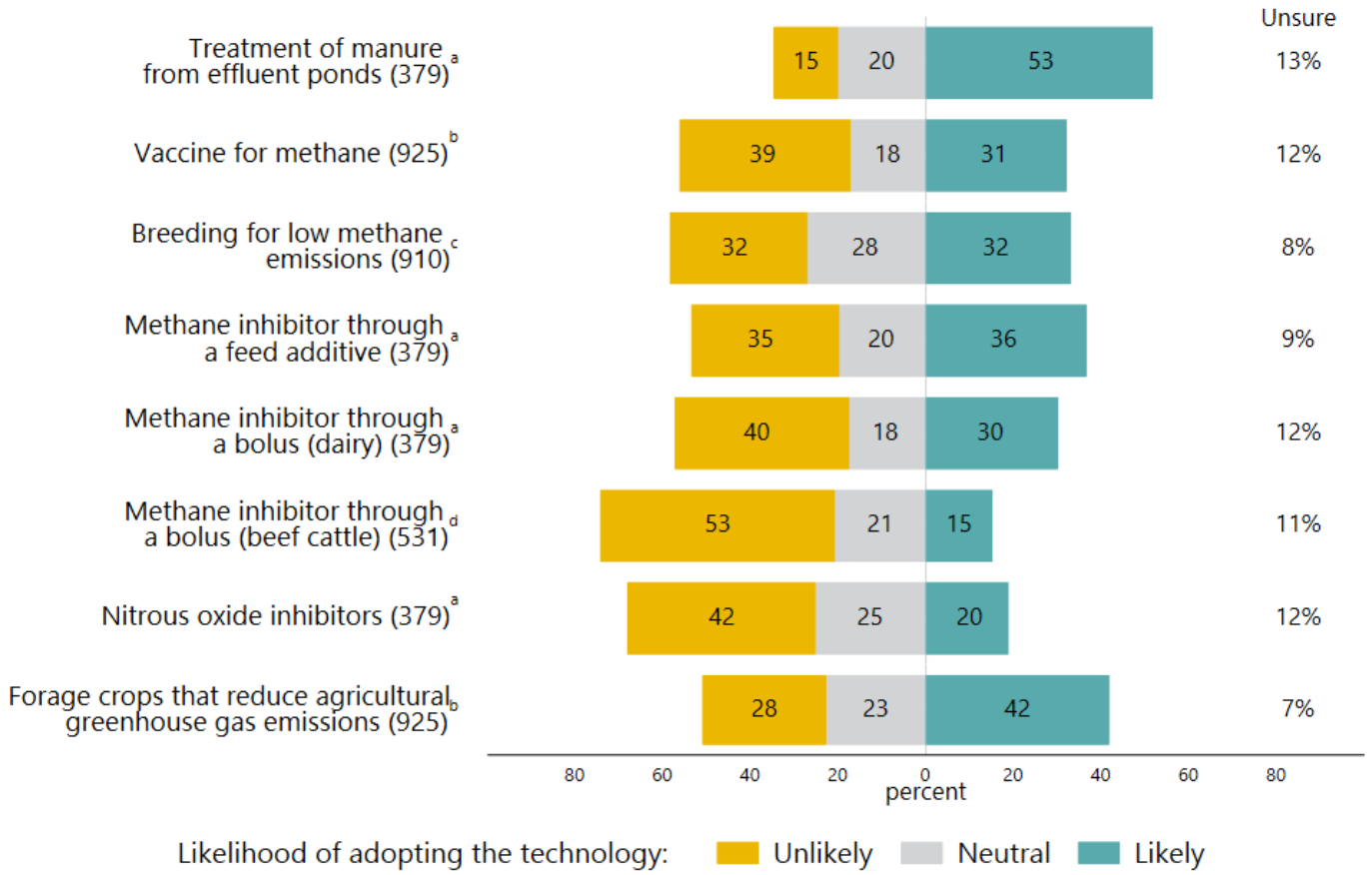
Anticipated future adoption



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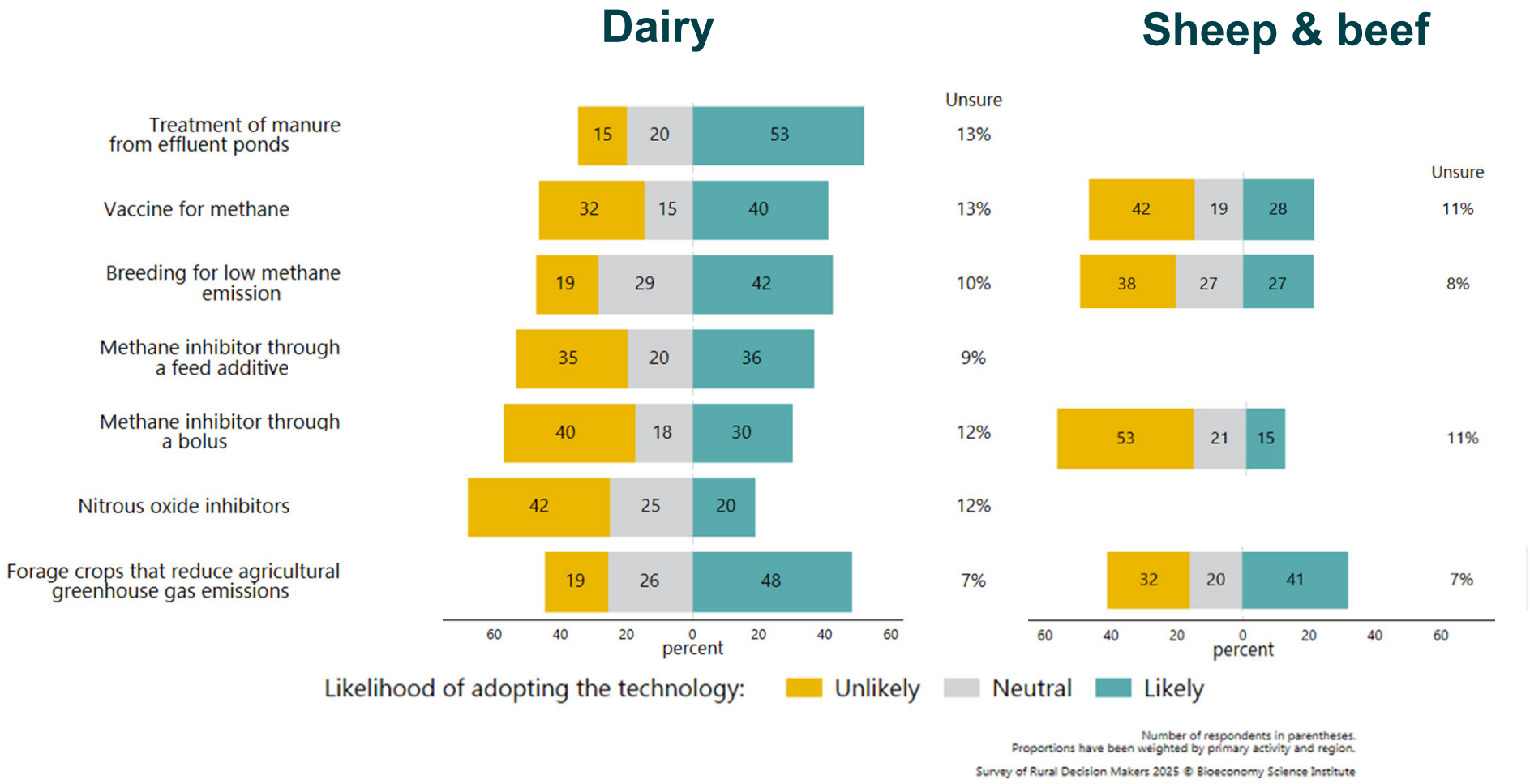
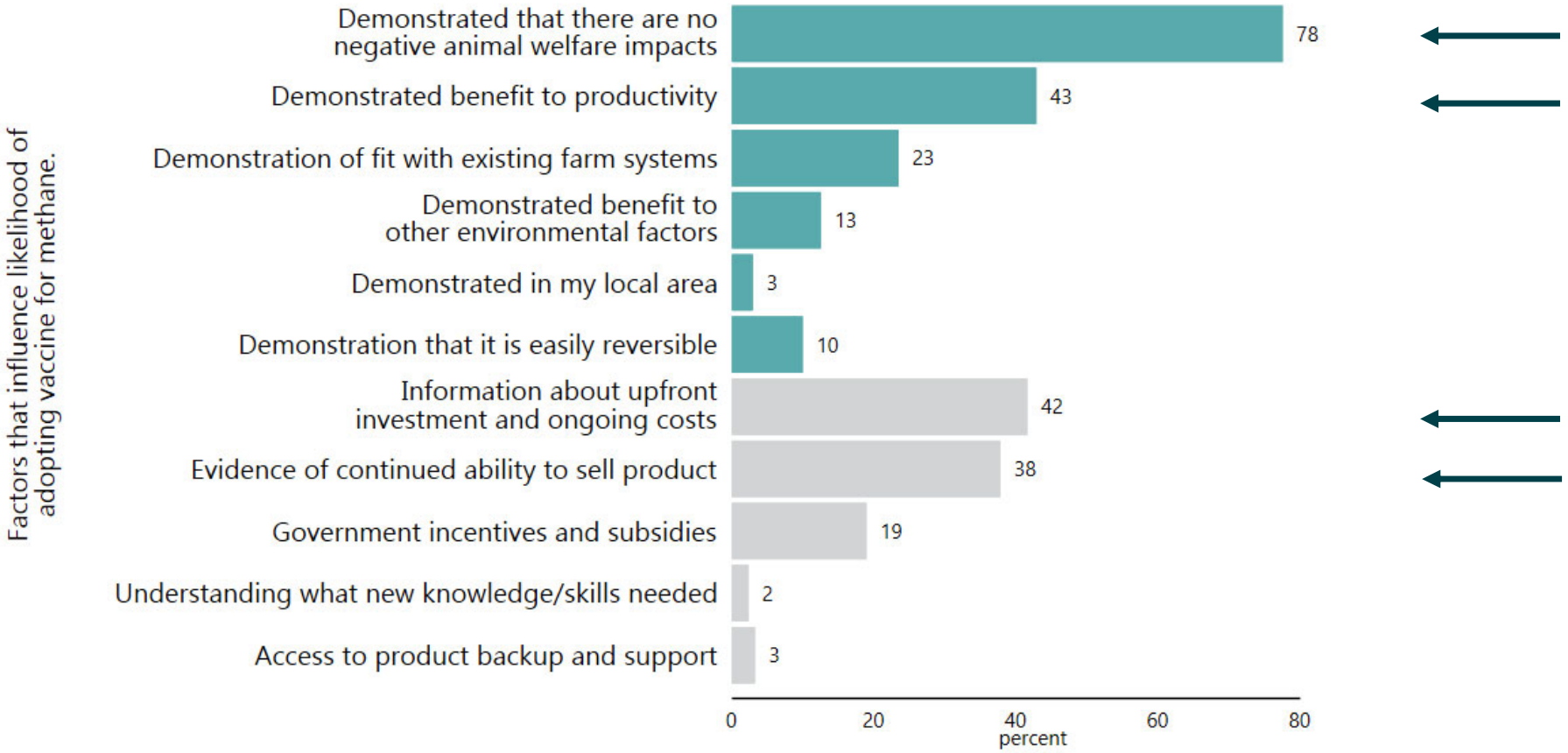
a: Operations with dairying activities.
b: Operations with sheep, beef, prime beef cattle, dairying, or deer farming activities.
c: Operations with sheep, beef, prime beef cattle, or dairying activities.
d: Operations with sheep, beef, or prime beef cattle activities.

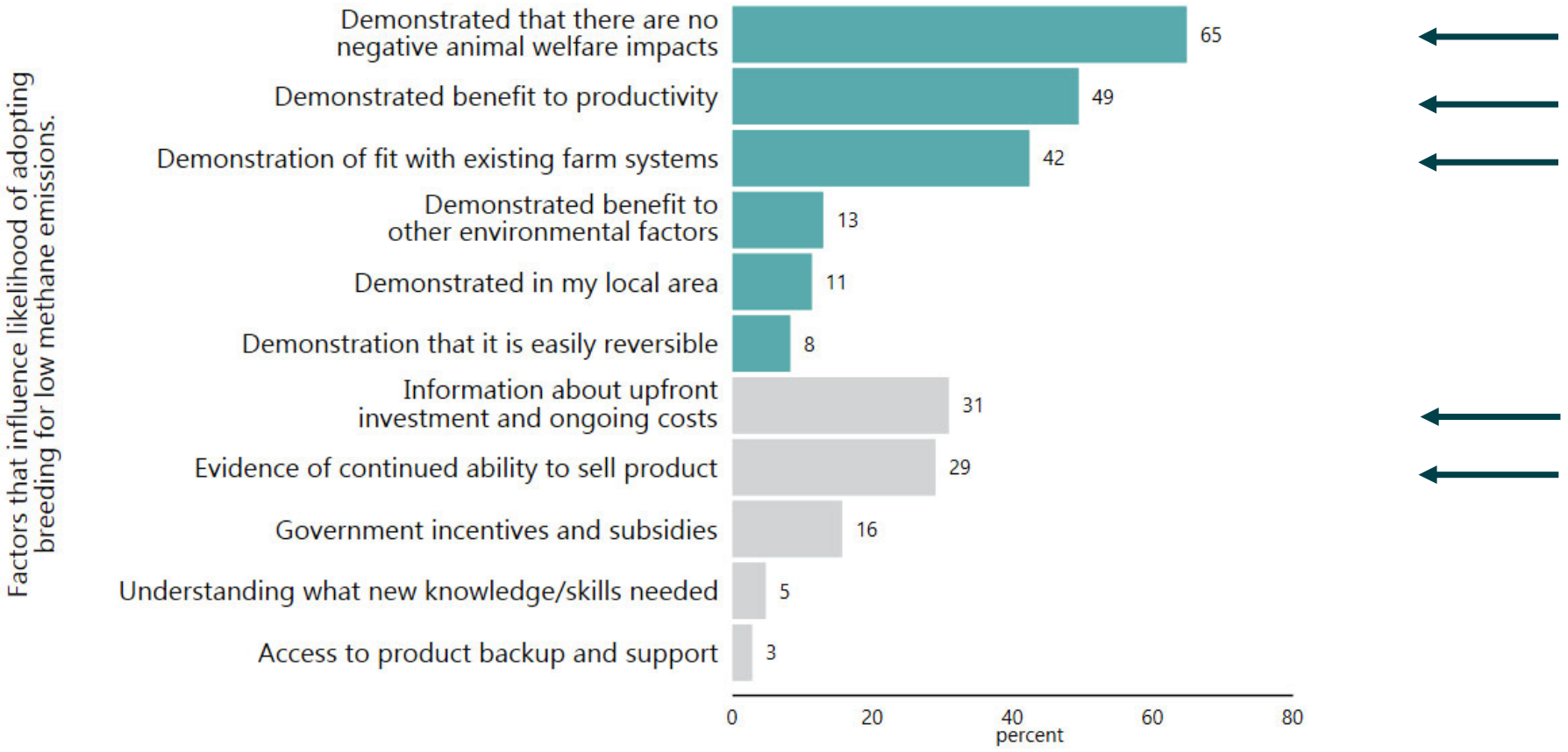
Anticipated future adoption



Future adoption of GHG technologies
Vaccines



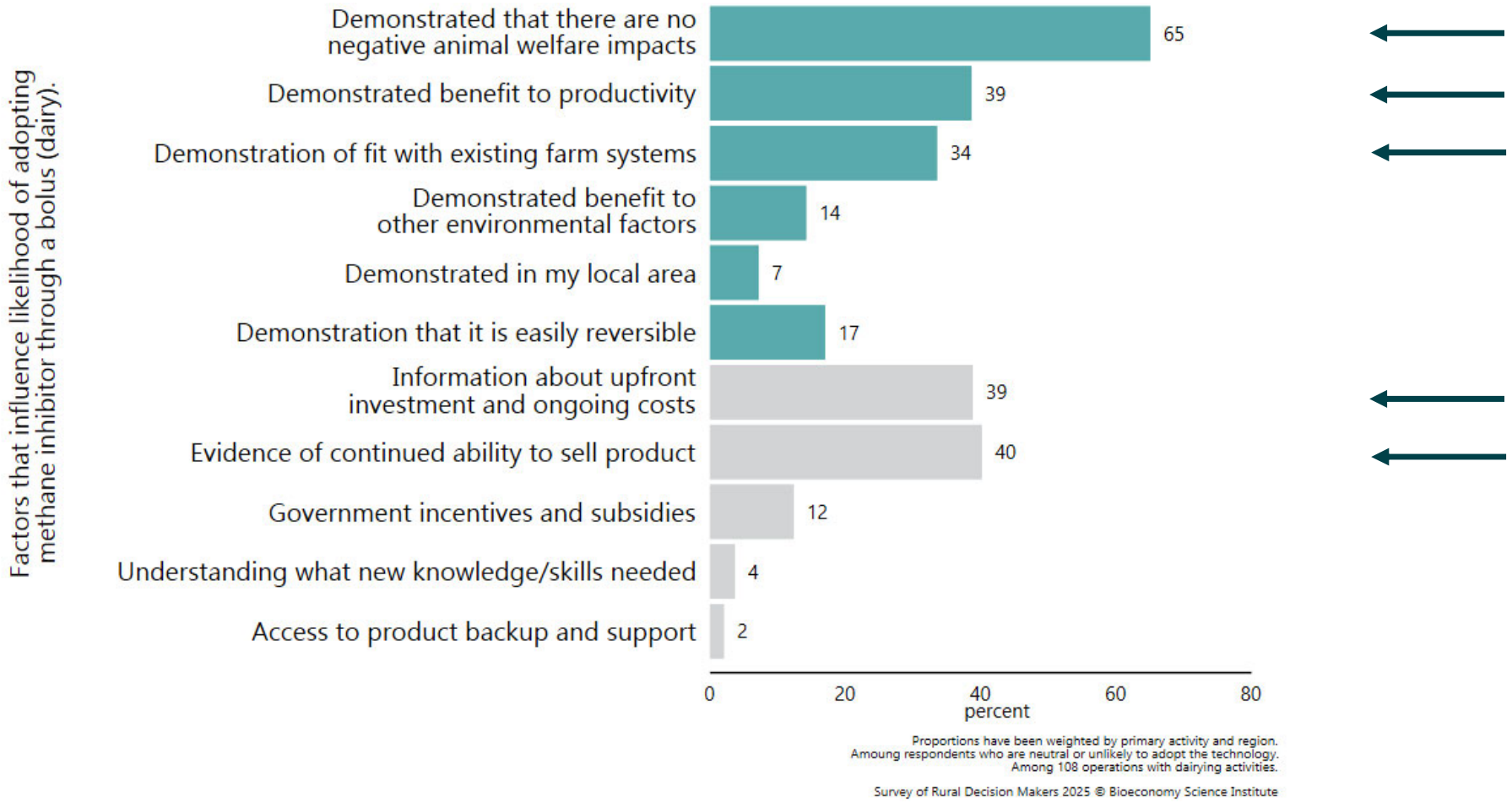
Future adoption of GHG technologies
Breeding



Proportions have been weighted by primary activity and region.
Amoung respondents who are neutral or unlikely to adopt the technology.
Among 339 operations with sheep, beef, prime beef cattle, or dairying activities.

Survey of Rural Decision Makers 2025 © Bioeconomy Science Institute

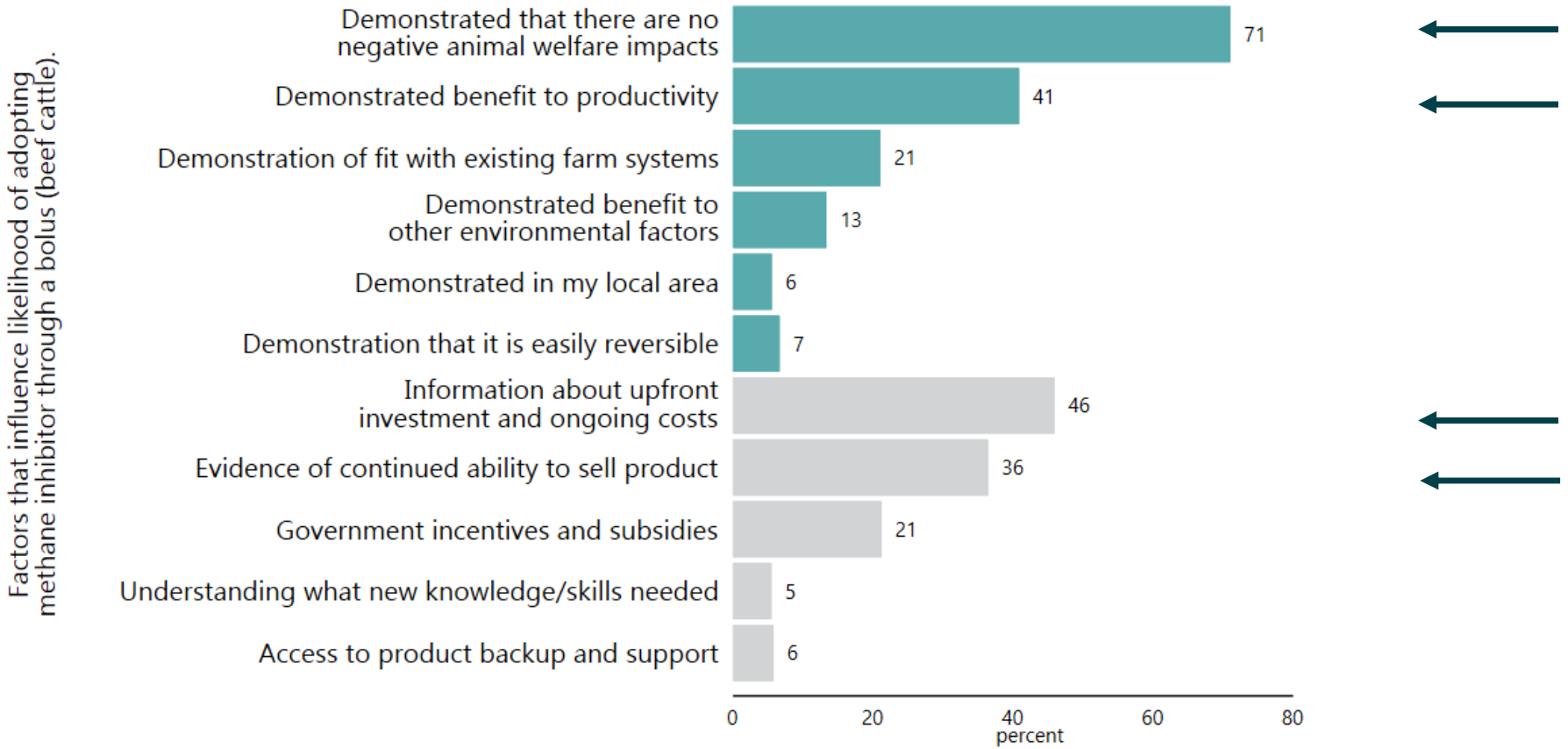
Future adoption of GHG technologies
Bolus (dairy cattle)



Proportions have been weighted by primary activity and region.
Amoung respondents who are neutral or unlikely to adopt the technology.
Among 108 operations with dairying activities.

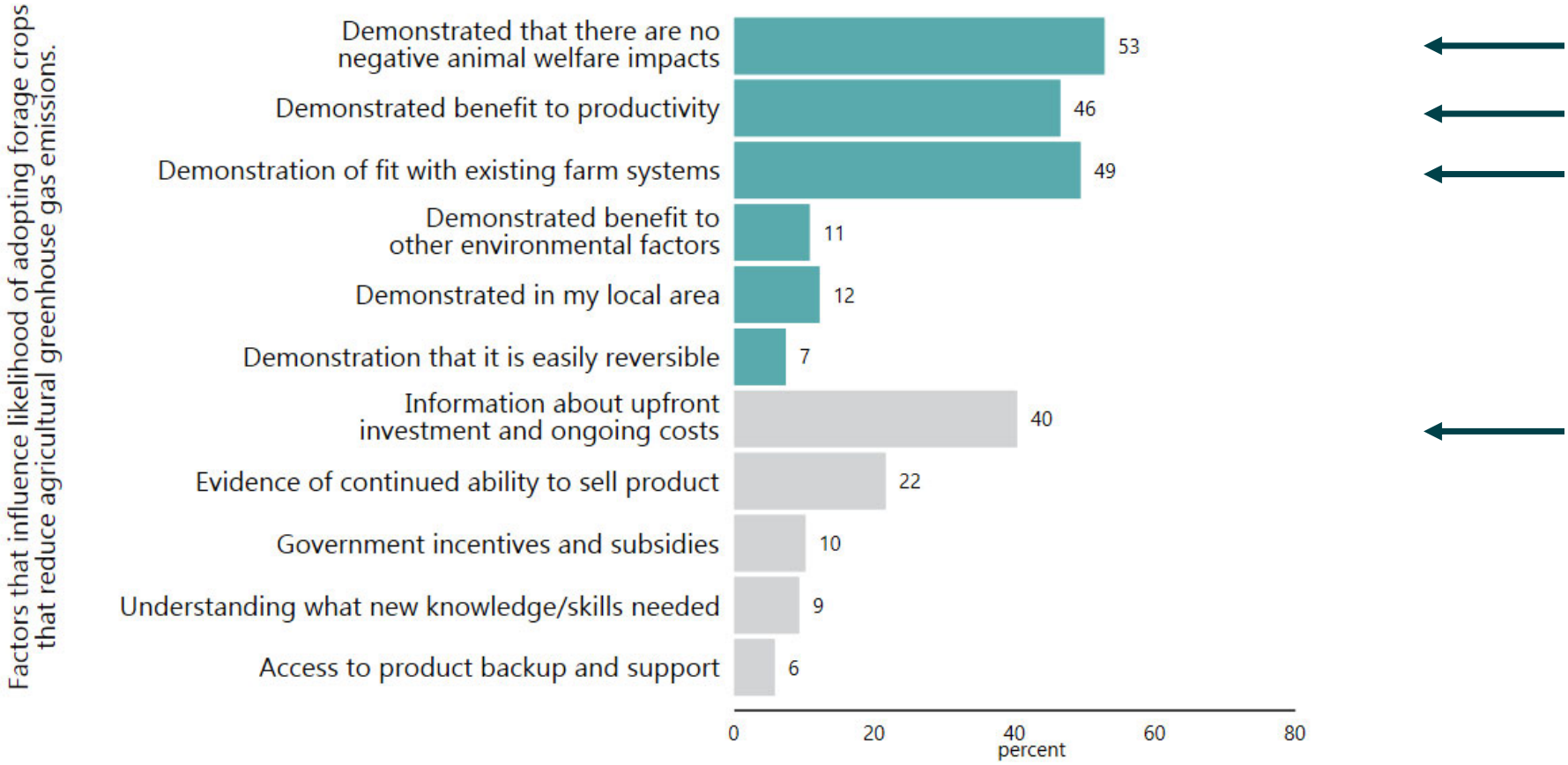
Survey of Rural Decision Makers 2025 © Bioeconomy Science Institute

Future adoption of GHG technologies
Bolus (beef cattle)



Proportions have been weighted by primary activity and region.
Amoung respondents who are neutral or unlikely to adopt the technology.
Among 277 operations with dairying activities.

Future adoption of GHG technologies
Forage crops



Proportions have been weighted by primary activity and region.
Amoung respondents who are neutral or unlikely to adopt the technology.
Among 263 operations with dairying activities.

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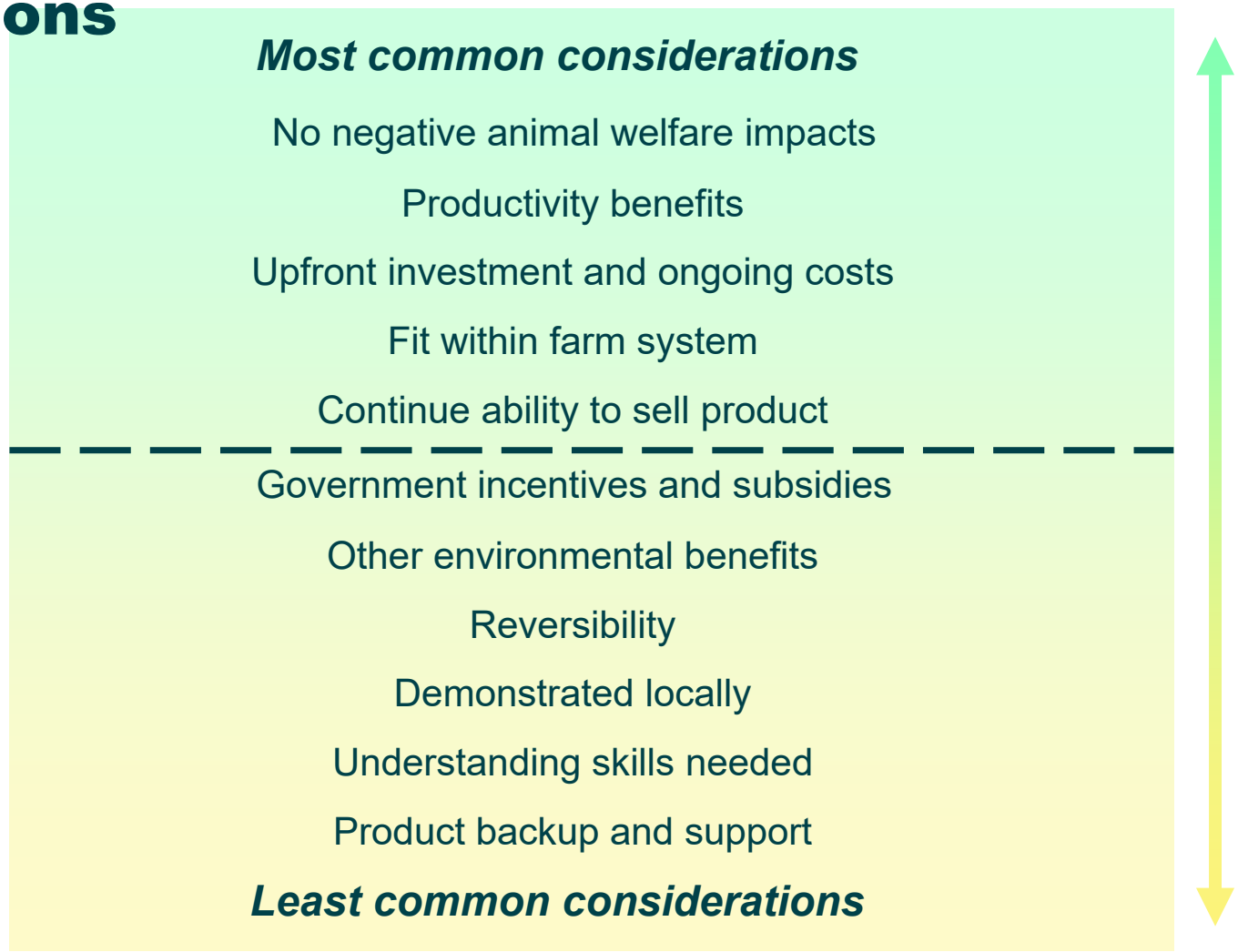
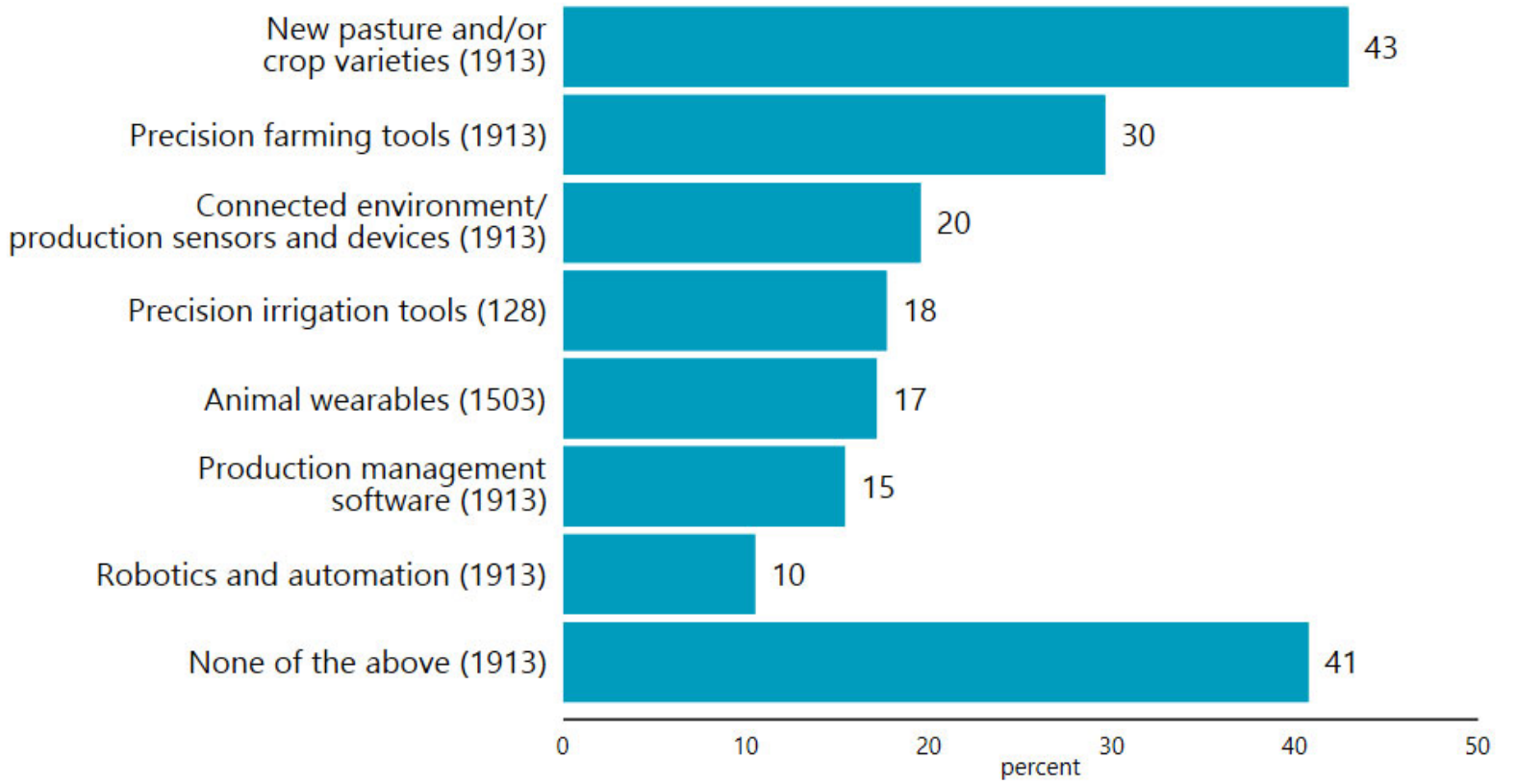
Future adoption of GHG technologies
Considerations



Current adoption of other technologies



Number of respondents in parentheses.
Proportions have been weighted by primary activity and region.

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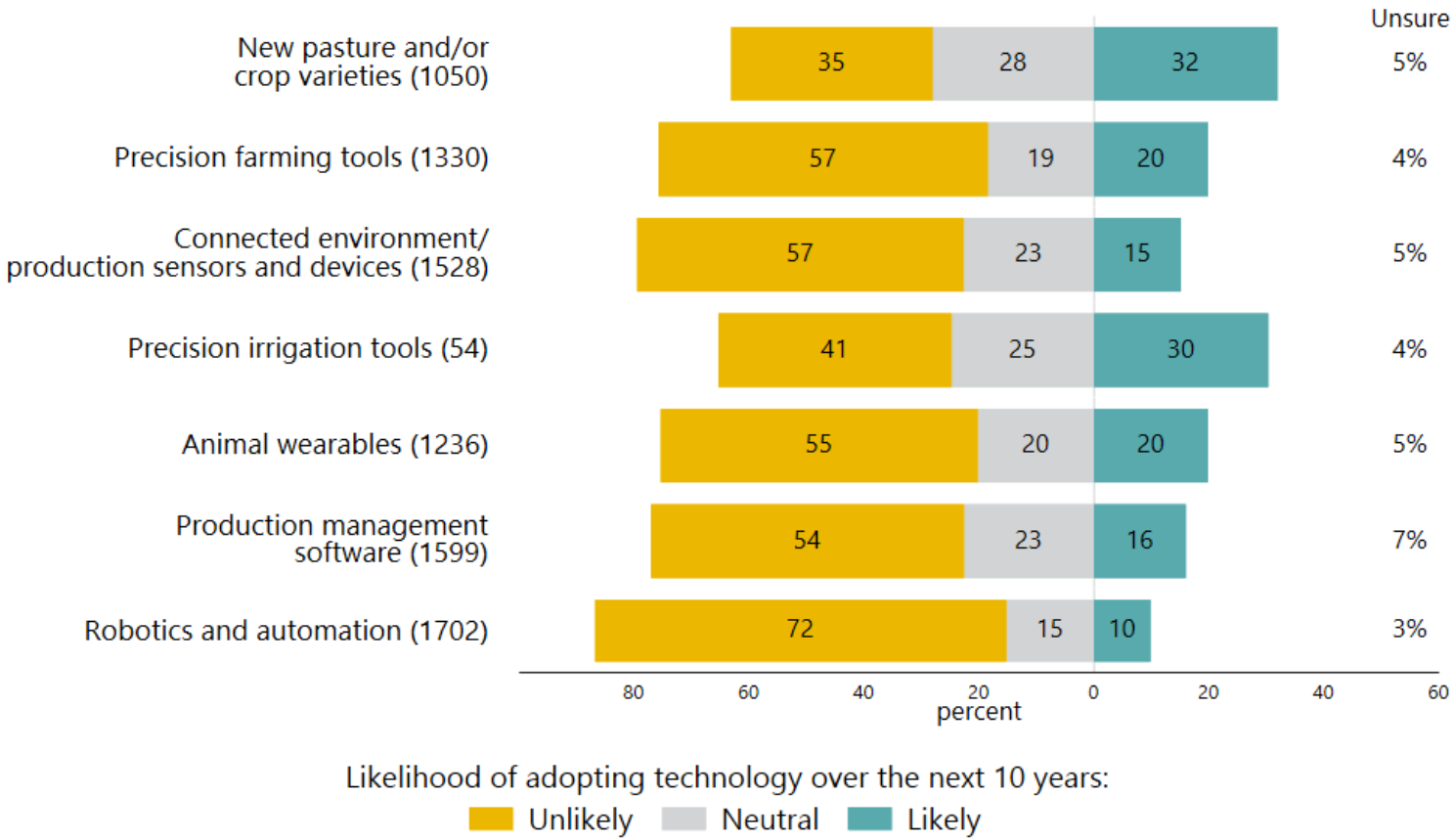
Current adoption of other technologies

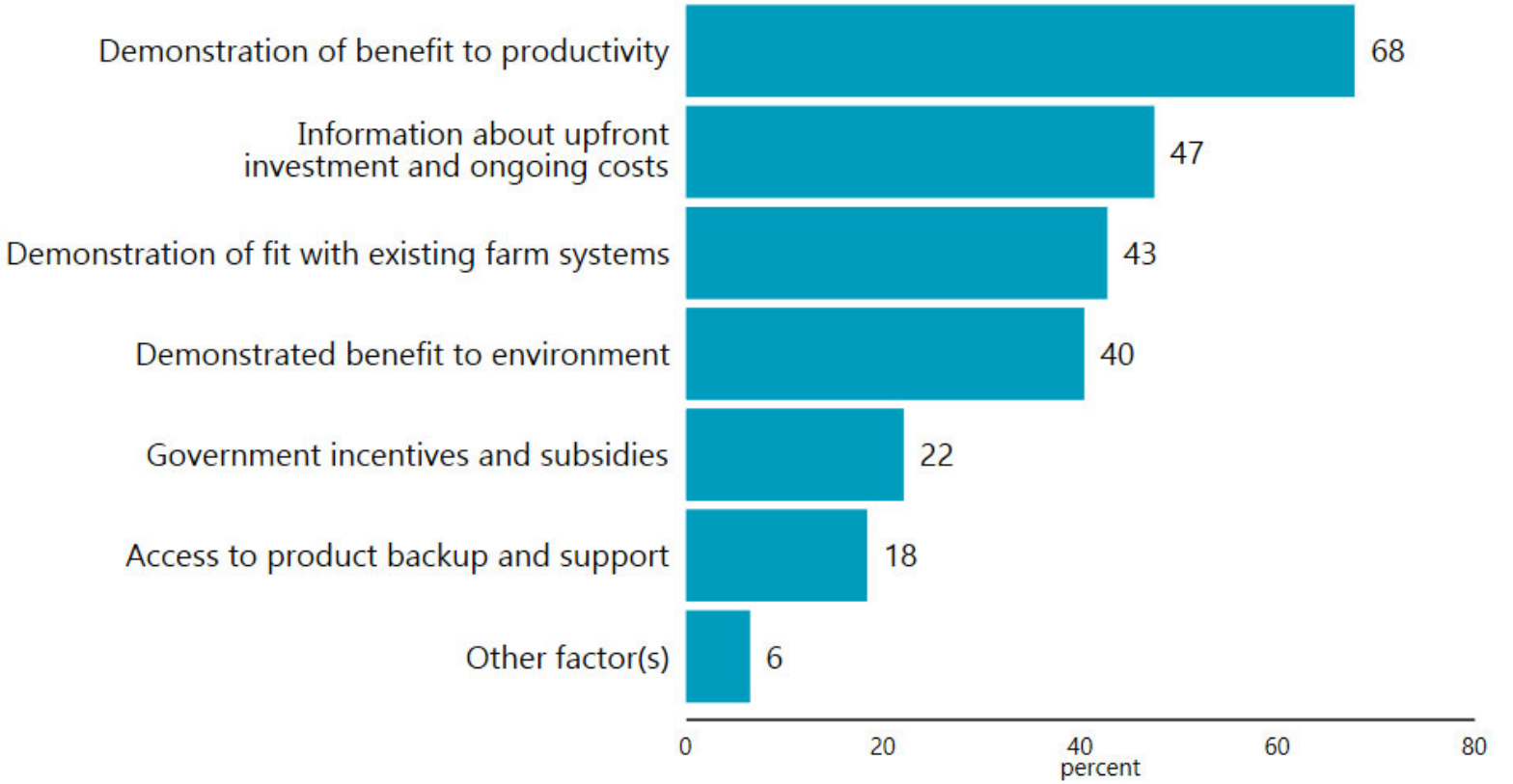
	Sheep & beef	Dairy	Arable	Hort	Forestry
New pasture/crop varieties	38%	65%	56%	34%	28%
Precision farming tools	24%	43%	54%	25%	25%
Connected sensors and devices	12%	26%	32%	45%	2%
Animal wearables	11%	35%	-	-	-
Production management software	13%	24%	32%	12%	7%
Robotics and automation	2%	37%	8%	8%	8%
None of the above	49%	14%	28%	37%	59%

Anticipated future adoption



Number of respondents in parentheses.
Among commercial operators who are not currently using the technology.
Proportions have been weighted by primary activity and region.

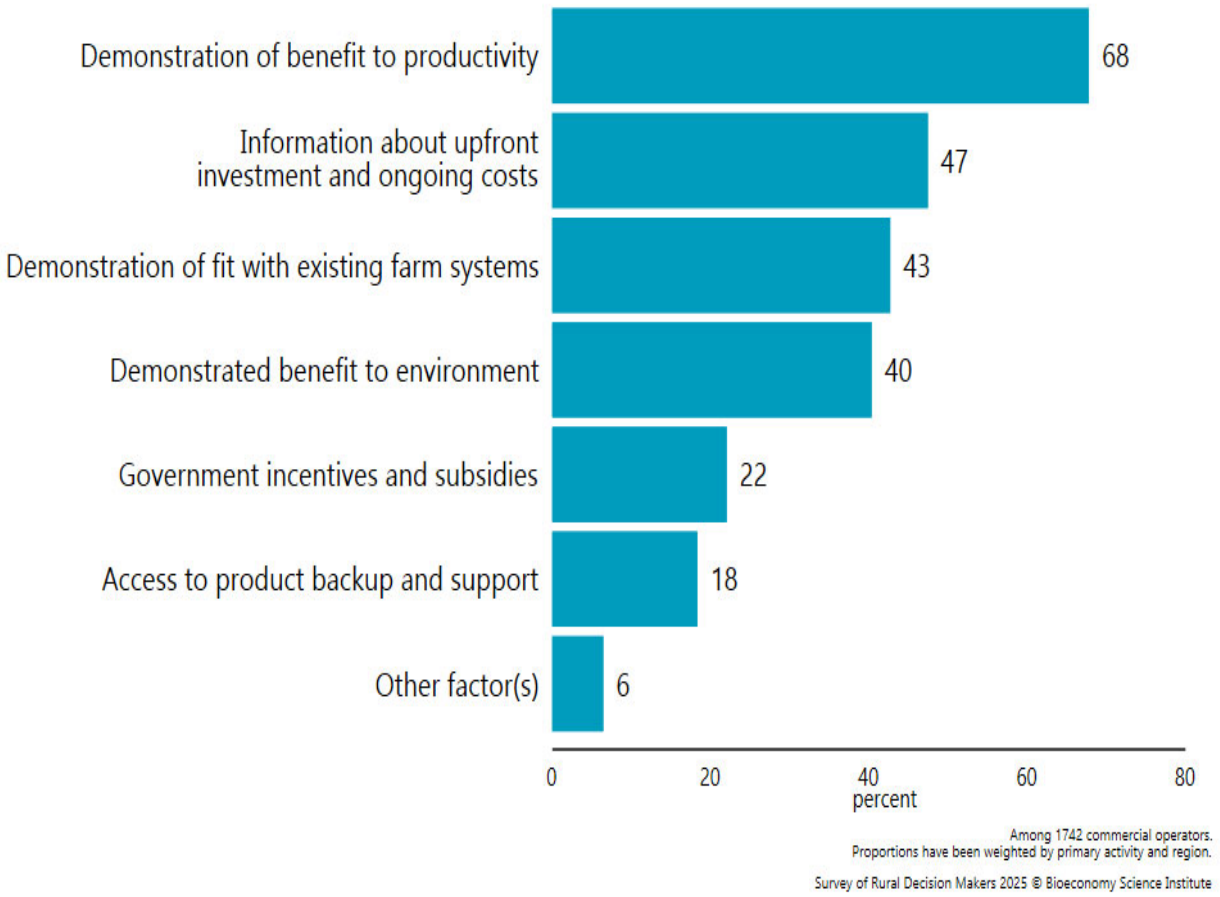
Anticipated future adoption
Considerations



Among 1742 commercial operators.
Proportions have been weighted by primary activity and region.

Survey of Rural Decision Makers 2025 © Bioeconomy Science Institute

Anticipated future adoption
Considerations



Most common considerations

No negative animal welfare impacts

Productivity benefits

Upfront investment and ongoing costs

Fit within farm system

Continue ability to sell product

Government incentives and subsidies

Other environmental benefits

Reversibility

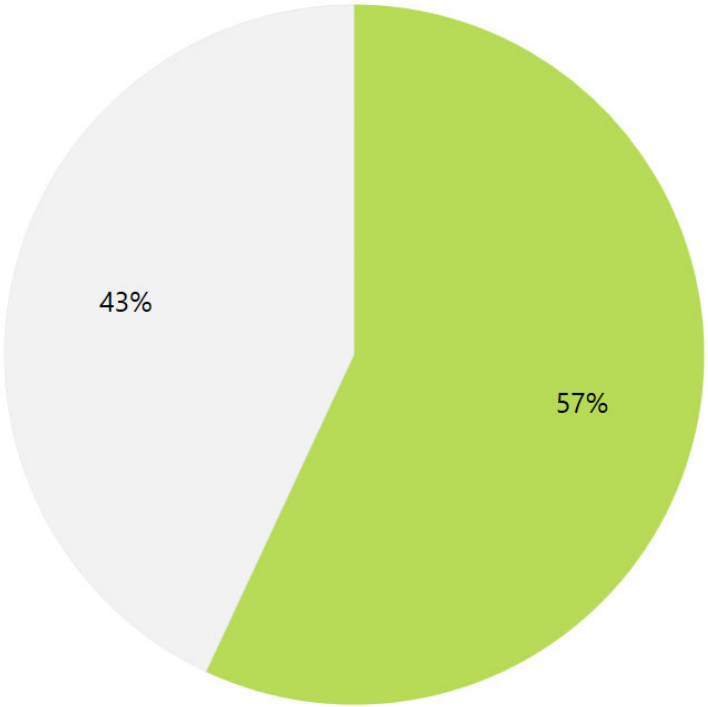
Demonstrated locally

Understanding skills needed

Product backup and support

Least common considerations

Advice from professional farm advisors



Among 2708 respodents.
Proportions have been weighted by primary activity and region.

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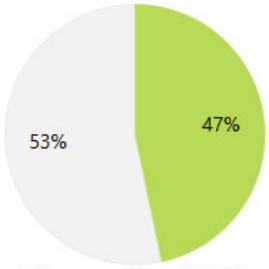
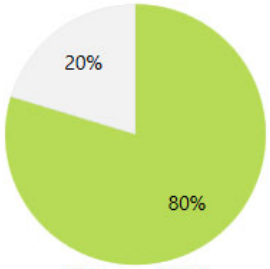
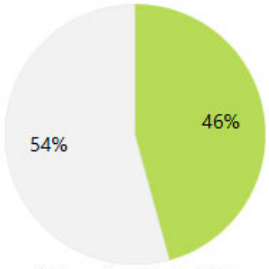


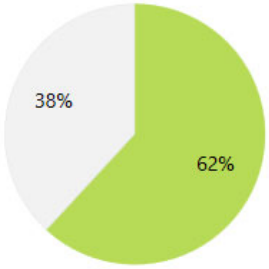
Sheep and beef (985)



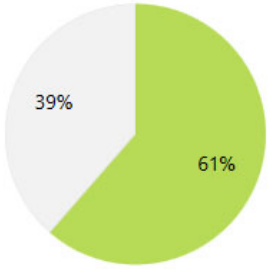
Dairying (383)



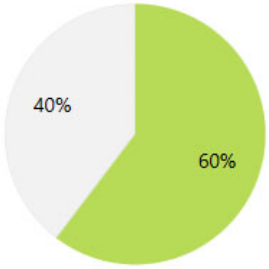
Other livestock (73)



Arable (67)



Horticulture (168)



Forestry (38)

Sought advice from a professional farm advisor:
Yes
No

Number of respondents in parentheses.
Proportions have been weighted by primary activity and region.

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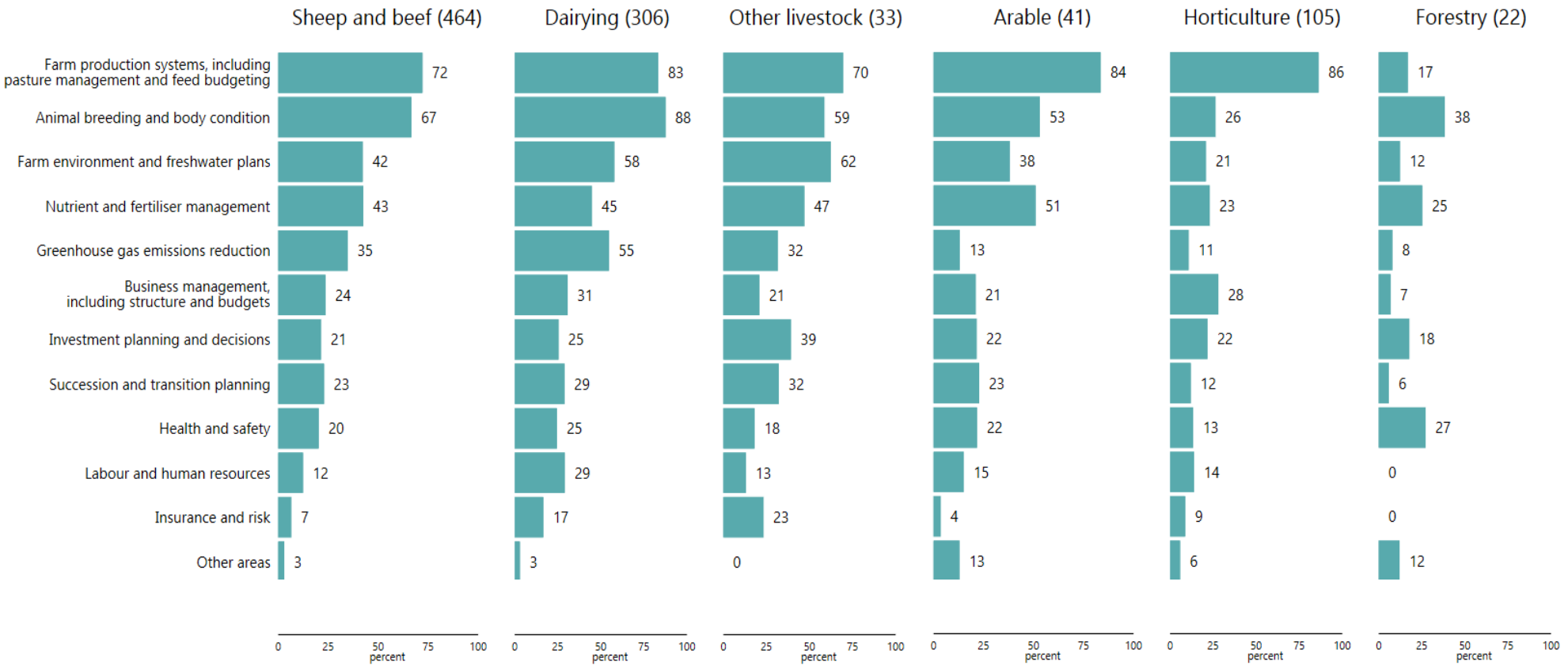
Advice from professional farm advisors



Number of respondents in parentheses.
Proportions have been weighted by primary activity and region.

Tech adoption

Catchment groups

Climate expectations

Age profiles

SCAN ME

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Key results sheet 1: Rural regulation

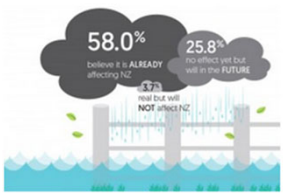
The 2023 survey include three questions about rural regulation, identified in 2021 as a significant cause of stress.

FACTSHEET

Key results sheet 4: Environmental outomes

Farmers, foresters, and growers were asked to compare their environmental performance of their operations with the environmental performa...

FACTSHEET



Information sheet: Impacts from climate change

Most survey respondents believe climate change is real and already affecting NZ.

Key results sheet 2: Sources of advice

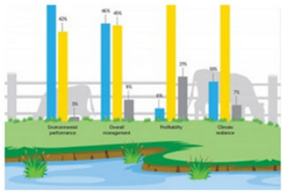
Farmers, foresters, and growers were asked to identify who was a potential source of advice for their operation, how much they trusted th...

FACTSHEET

Key results sheet 5: Future intentions

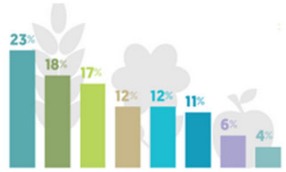
We asked farmers, foresters, and growers about their retirement plans.

FACTSHEET



Information sheet: Restricting stock from waterways

Dairy and beef farmers are taking measures to restrict stock from waterways.



Key results sheet 3: Land-use change

Farmers, foresters, and growers were asked whether any of their current land uses were new in the last two years. They were also asked wh...

FACTSHEET

Information sheet: Rural well-being

We used the WHO-5 Index to evaluate the well-being of commercial farmers, foresters and growers and lifestyle block owners.

Information sheet: Aspirations for the land

Respondents were asked to describe the aspirations for their land using 3–5 short phrases.